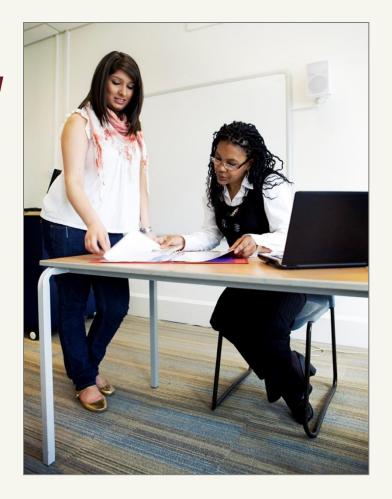
HRMS Grievance Tracking Training Guide





Course Objectives

- Upon completion of this course, you will be able to:
 - Explain the roles used in the Grievance Tracking System
 - Perform the required steps to administer a
 Grievance within the Grievance Tracking System
 - Track, report, and analyze grievance data
 - Take away all grievance resource materials



Housekeeping

- 1500 Jefferson Building Training Center logistics
- Cell phones on vibrate/silent
- Respect course start/end break times
- Actively participate in activities
- Share experiences and ideas
- Maintain focus and avoid side conversations
- Do not check your e-mail or otherwise use the web unless we are on a designated break



Agenda

- Introductions
 - Name, Agency, and your experience with HRMS Grievance or collective bargaining grievance procedures
- Terminology and Roles within Grievance Tracking
- Create and Manage a Grievance
 - Basic functions to more complex
 - Group grievances
- Generate Reports and Analyze Data
- Summary and Wrap up



Training Materials and Tools

- PowerPoint: Designed to introduce to you basic Grievance terms and concepts and teach you how to use the Grievance Tracking System.
- Reports Job Aid: Designed to provide end users with reference material so they may quickly access relevant HRMS information.
- Activity Guide: Designed to walk you through the exercises you will perform in the Grievance Tracking System today, including all user specific data.
- Glossary: Designed for you to use as a reference.



What is a Grievance?

- As defined in Collective Bargaining Agreements.
 - For example, the WFSE Agreement defines a grievance as "an allegation by an employee or group of employees that there has been a violation, misapplication, or misinterpretation" of the contract.
- The Grievance Tracking System is only used to track issues technically defined as a grievance in accordance with collective bargaining agreements.



Grievance Tracking System

- A system designed specifically for the State of Washington to track grievances filed by union-represented employees.
- HRMS [Human Resource Management System]



Grievance Roles - Agency

- Roles determine the data a person can access, display, and change in the Grievance Tracking system
- The following agency roles are used in the Grievance Tracking System:
 - Agency Grievance Administrator
 - Agency Grievance Inquirer



Grievance Roles - Centralized

- Centralized roles are assigned to the Labor Relations
 Division (LRD) and Department of Enterprise Services
 (DES) on behalf of assigned small agencies.
- LRD and DES use the following Centralized roles in the Grievance Tracking System:
 - Central Grievance Administrator
 - DES Small Agency Assistance



Grievance Roles - Summary

Agency Grievance Administrator

Has full access to "own" Agency Grievance data

Agency Grievance Inquirer

 Has read access and may run reports for "own" Agency Grievance data

Central Grievance Administrator

Has Statewide access to Grievance Tracking System

DES Small Agency Assistance

 Has full access only for agencies assigned DES small agency assistance in the Grievance Tracking System

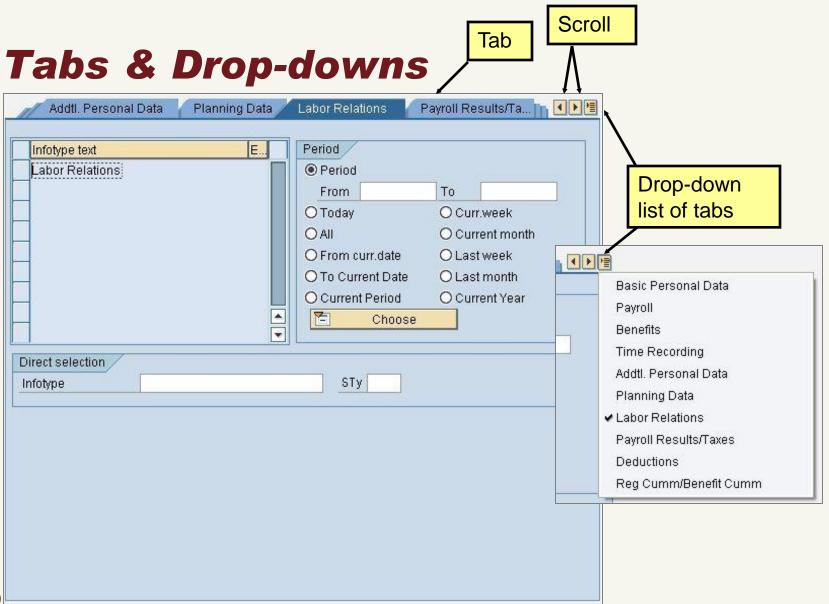


Grievance Training Walk Through Activity



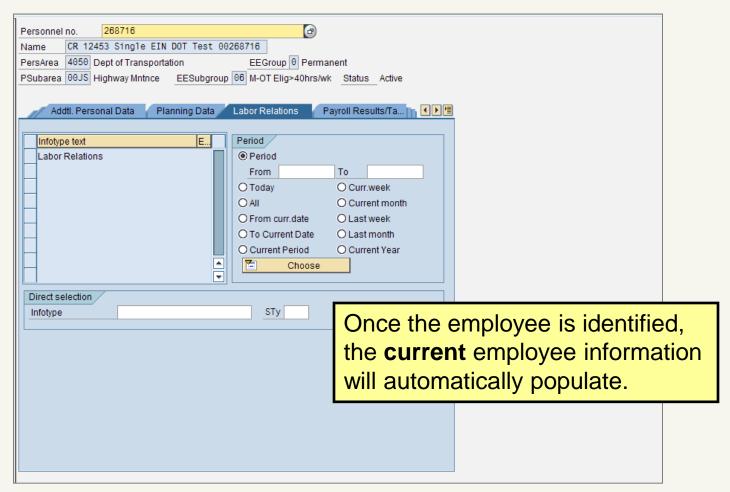
Logging into HRMS HCM





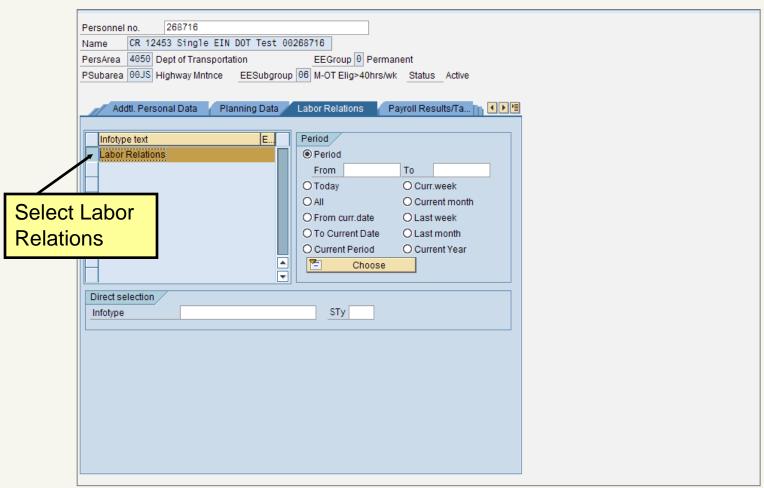


Creating a Grievance



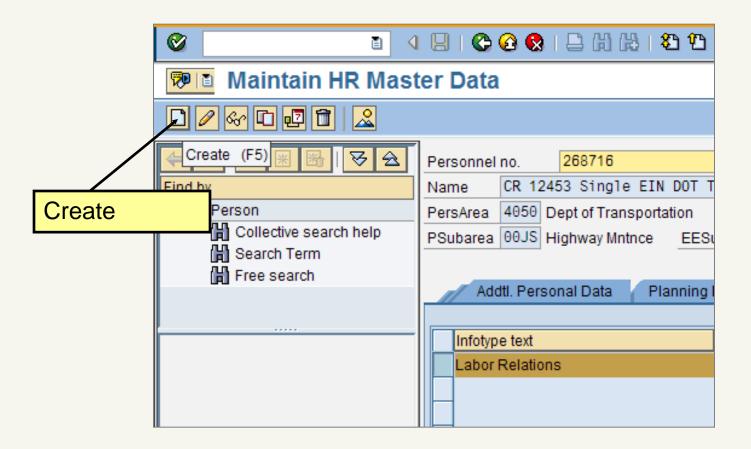


Creating a Grievance



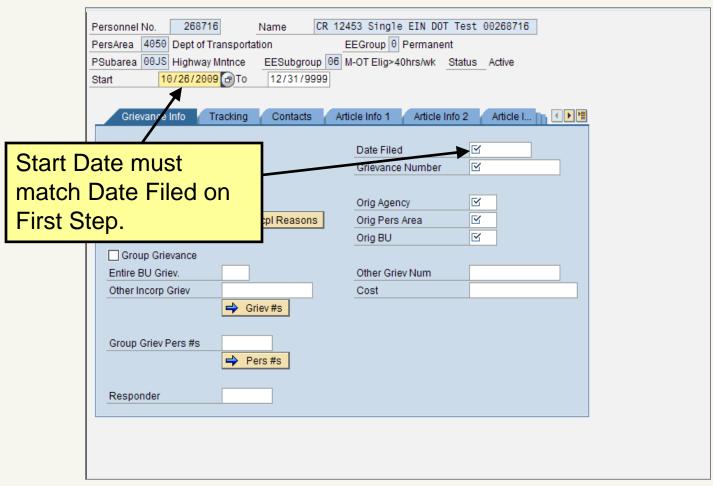


Creating a Grievance



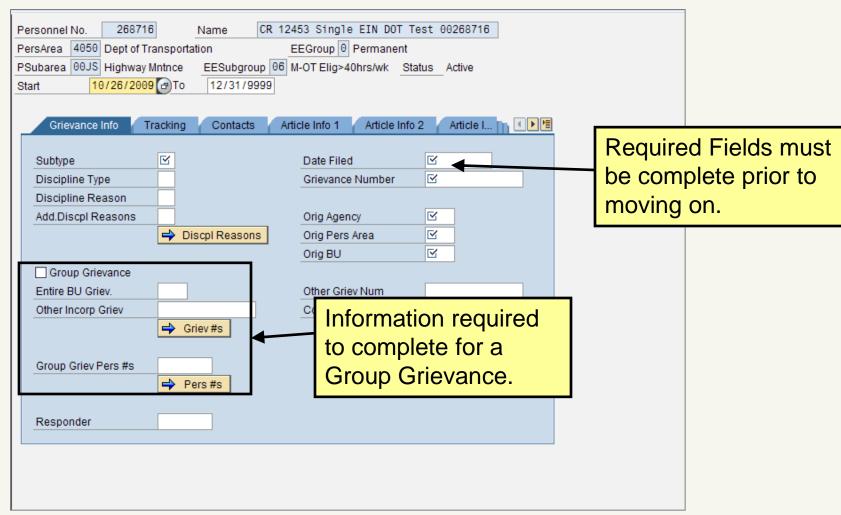


Creating a Grievance - Dates





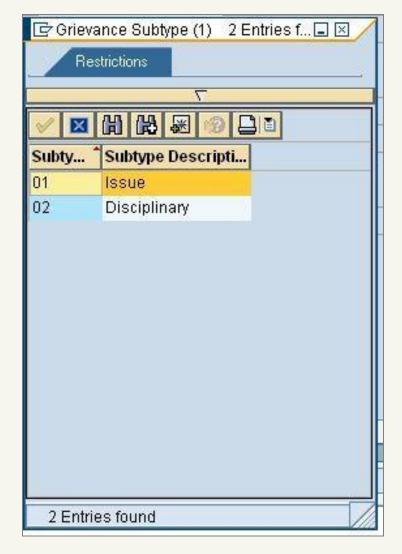
Creating a Grievance, Grievance Info





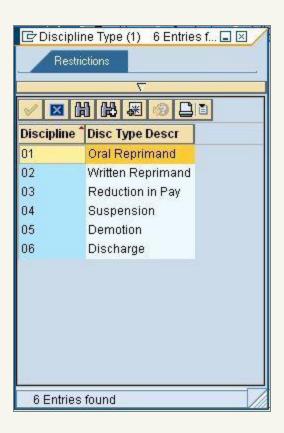
Create a Grievance - Subtype

- Subtype
 - Issue
 - Disciplinary

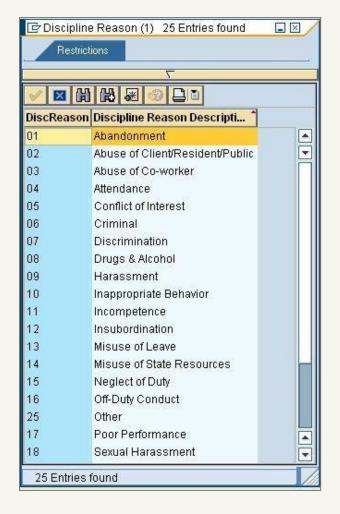




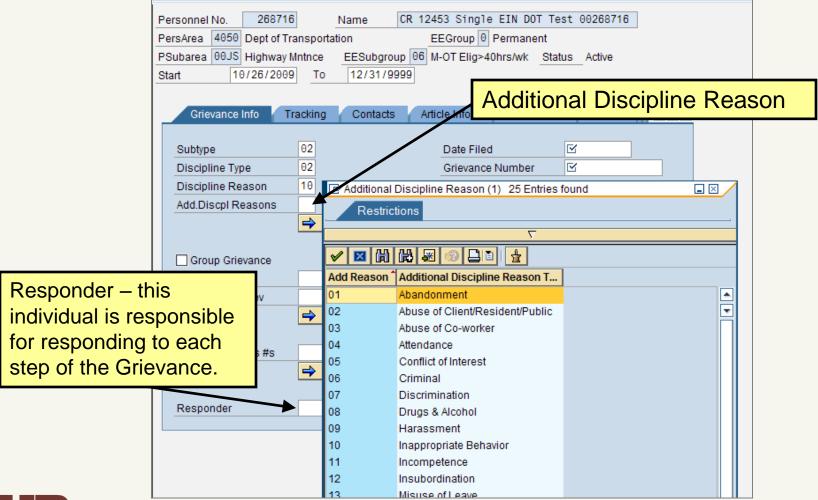
Discipline Type



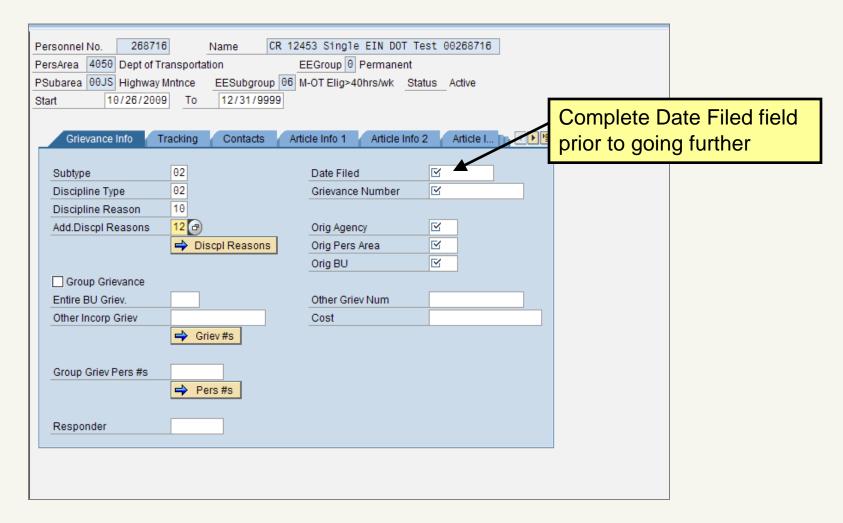
Discipline Reason



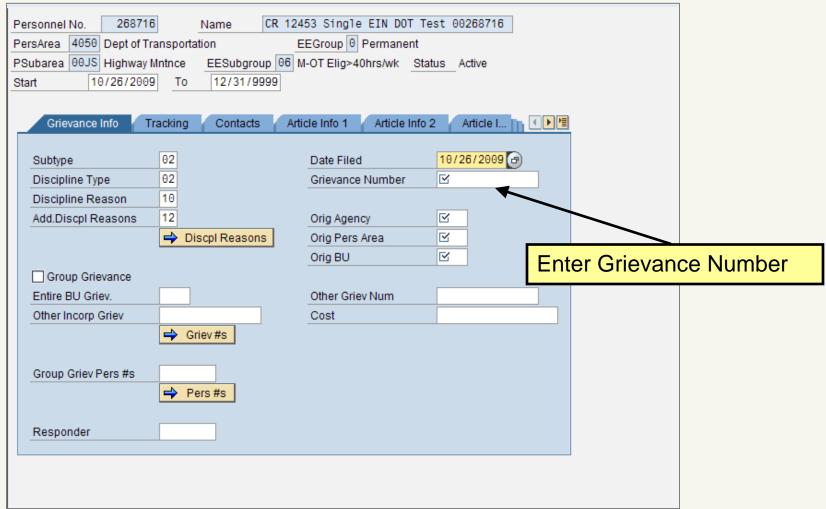




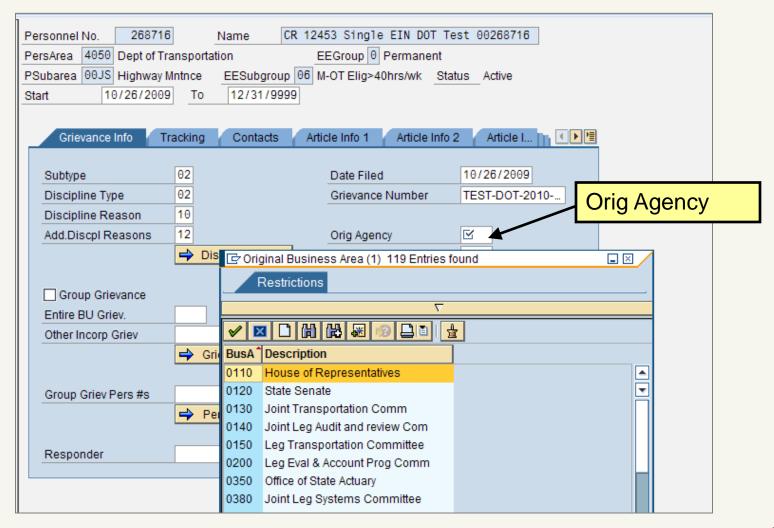




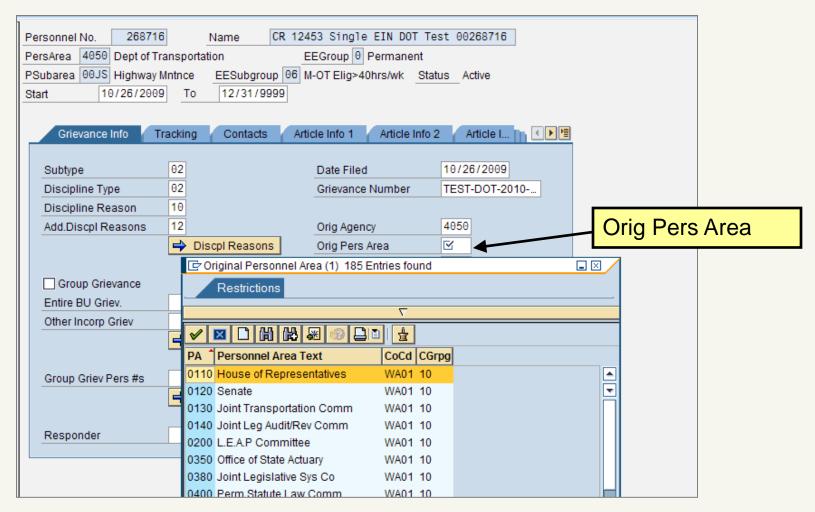




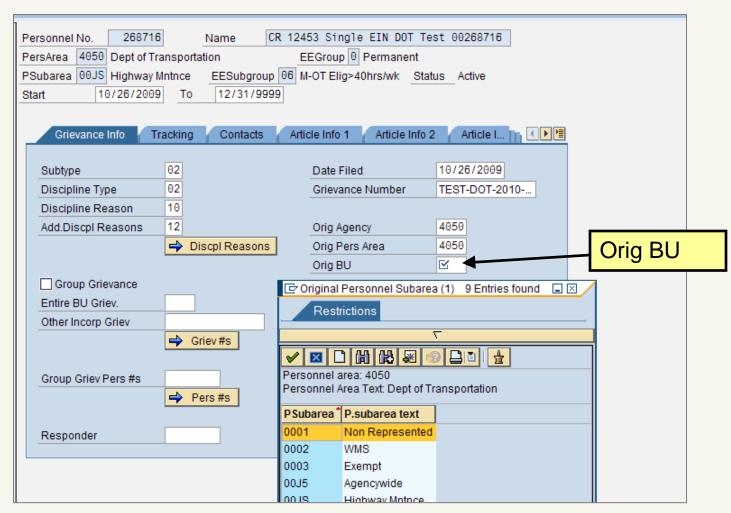






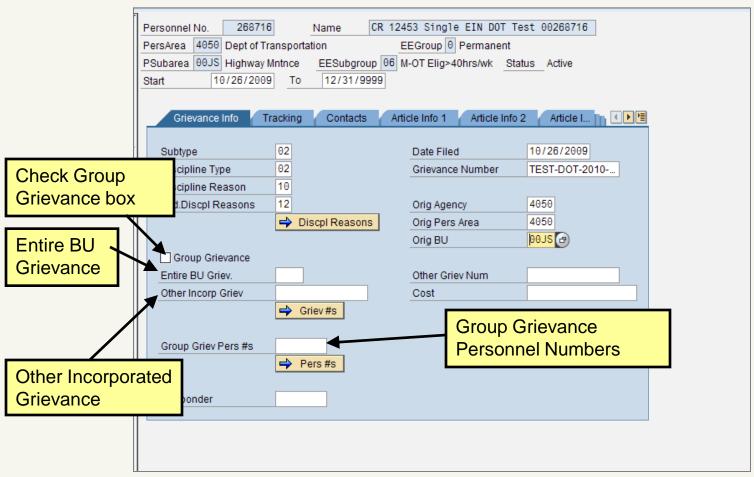




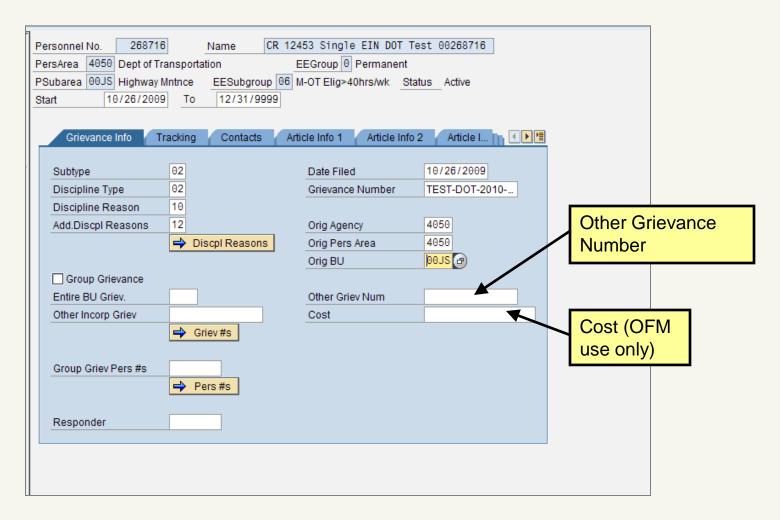




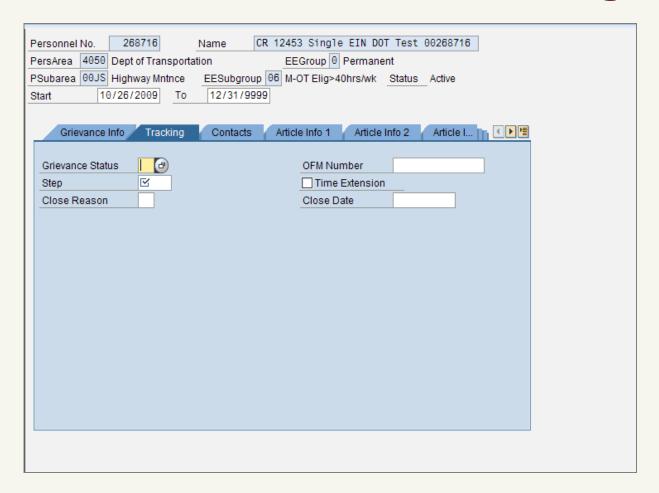
Create a Group Grievance



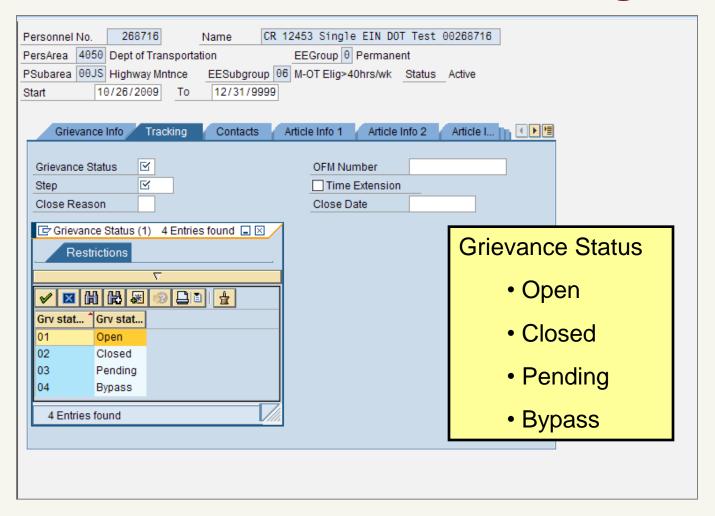




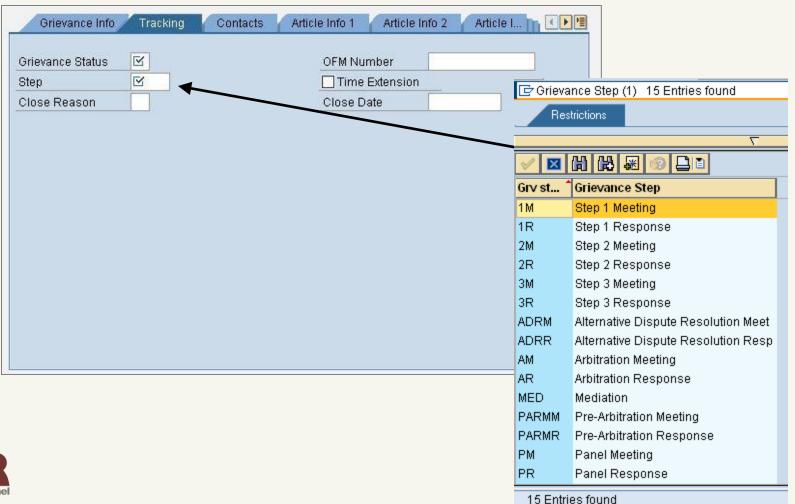




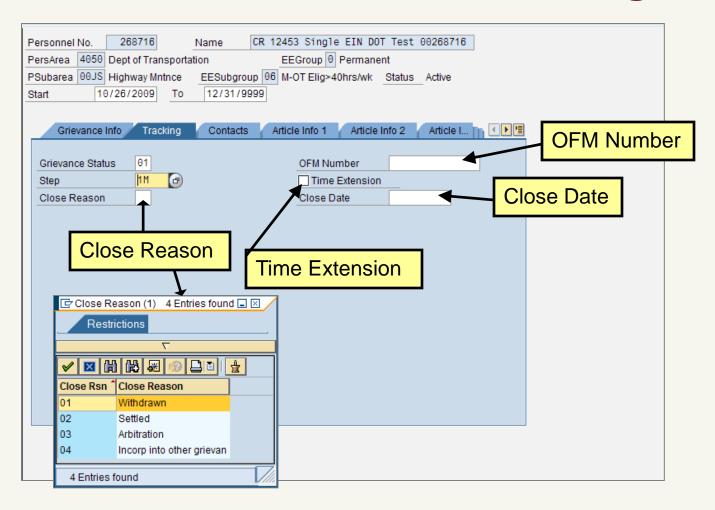






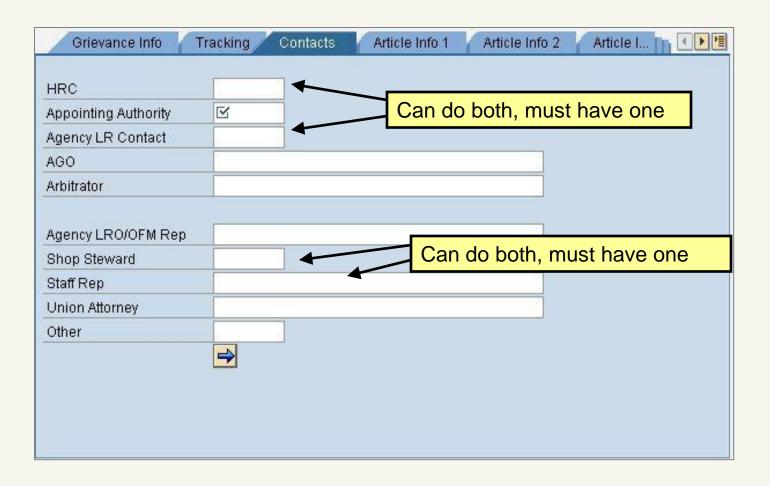






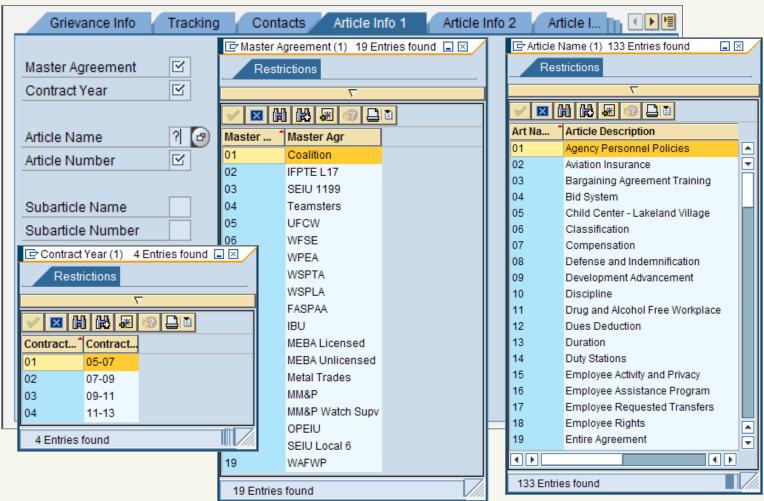


Create a Grievance - Contacts



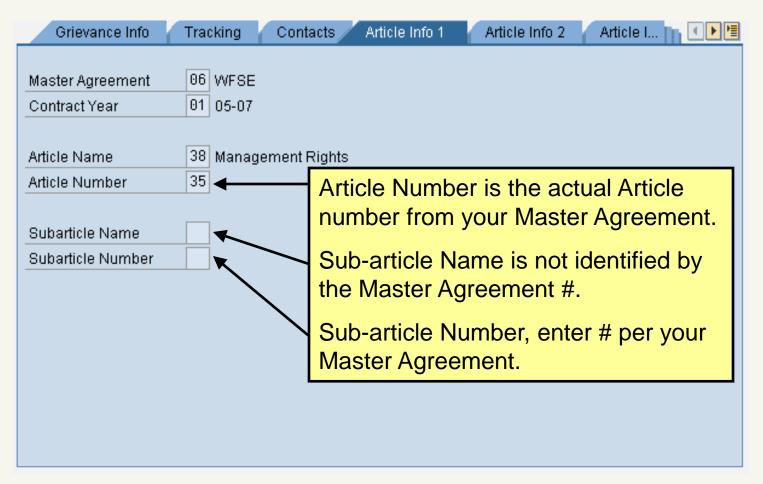


Create a Grievance - Article Info 1



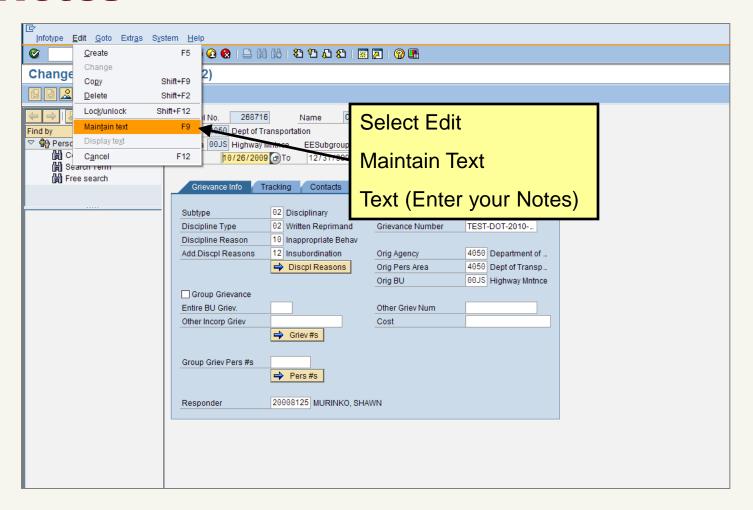


Create a Grievance - Article Info 1



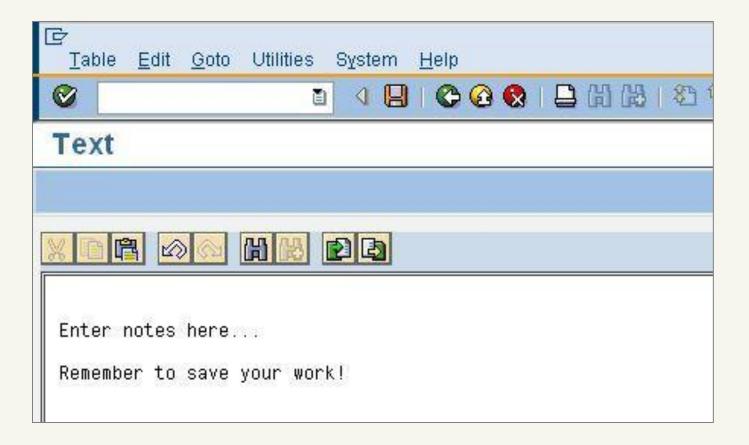


Notes



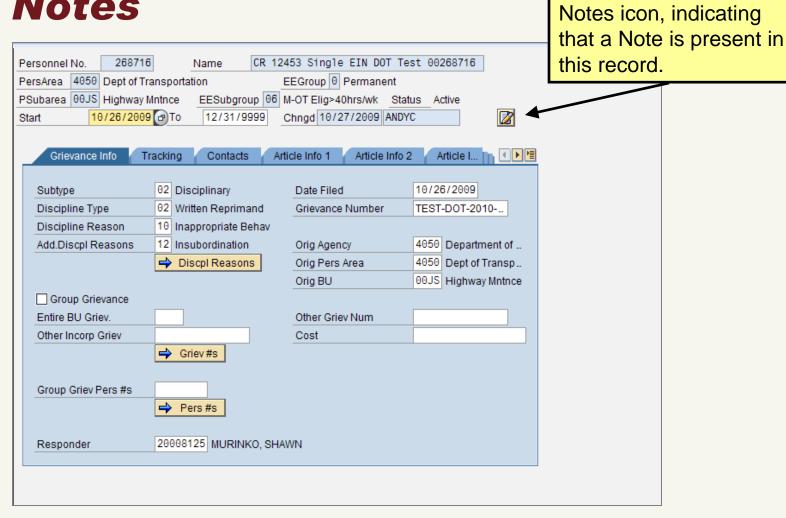


Notes





Notes





Grievance Training Exercise



Create a Grievance Activity 1, Page 2



Why Change a Grievance?

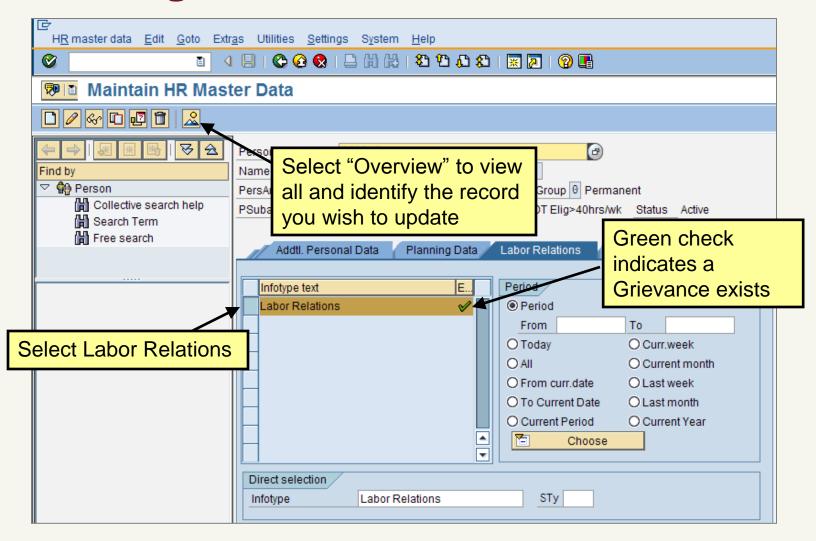
- Use the change icon <a>Image icon <a>Imag
- Once the record is updated, it replaces the information previously entered and becomes the record you see in the system.



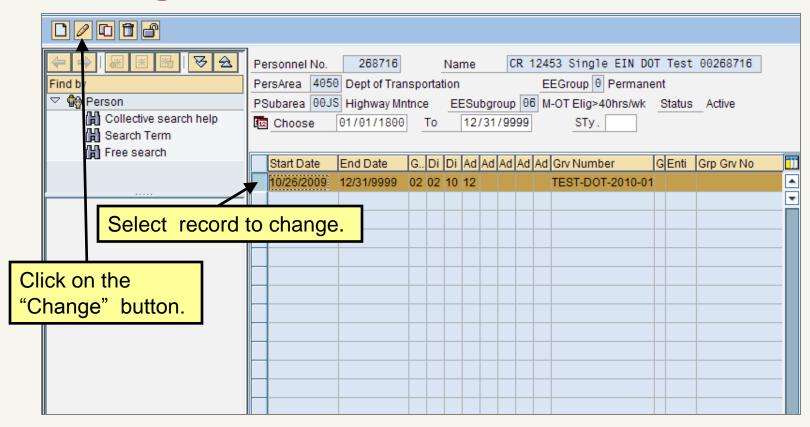
Steps to Change a Grievance

- Enter PA30 in the command field
- In Maintain HR Master Data, enter employee personnel number or search for it
- "Enter" key will populate the employee's personnel record
- Select the "Labor Relations" tab
- Select "Overview" la to view all records and identify the one you wish to change

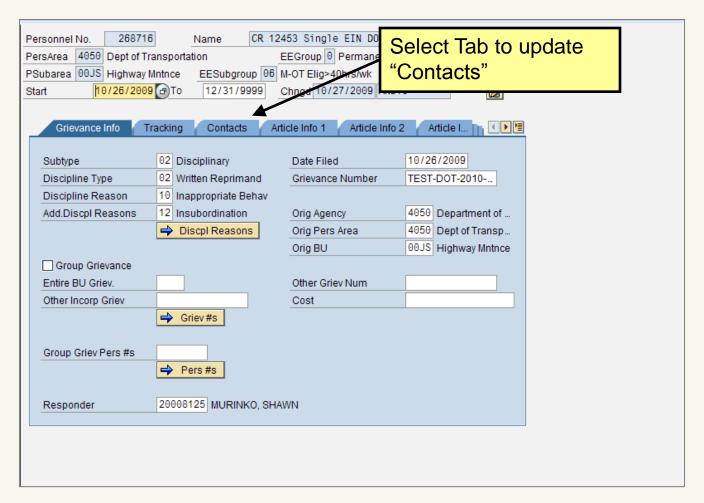




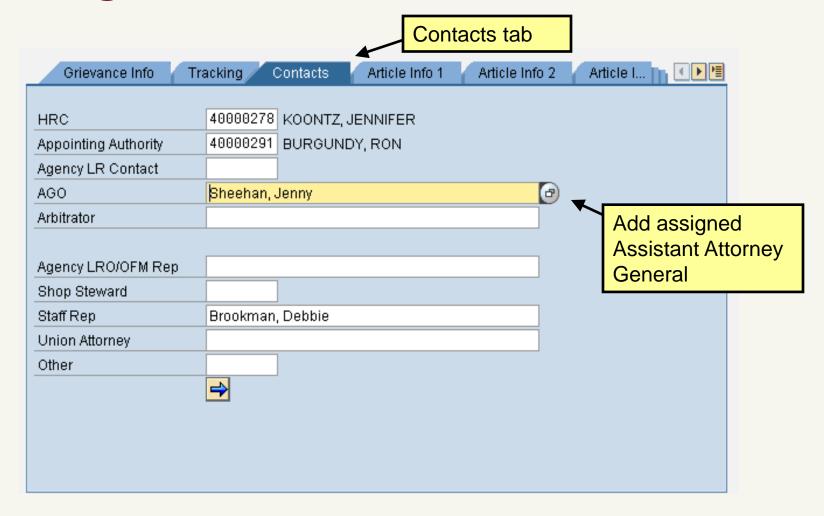




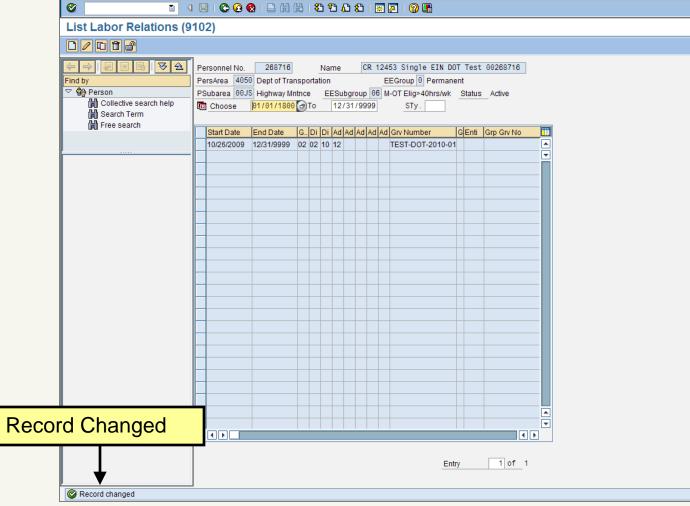




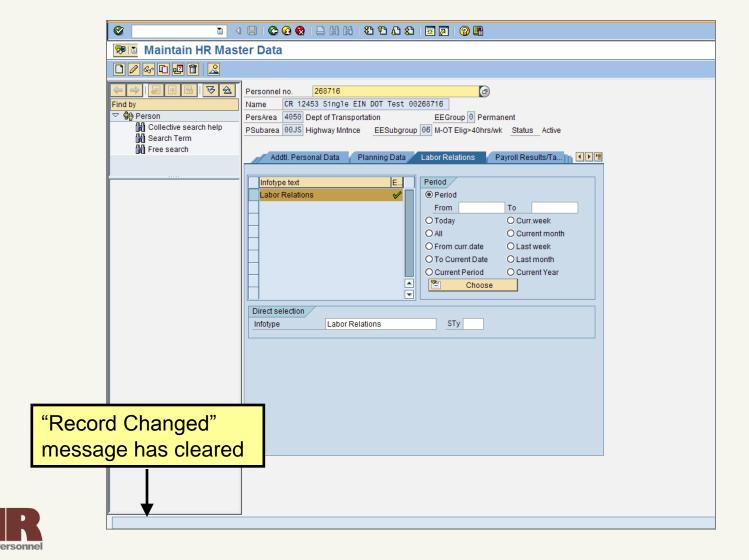












Grievance Training Exercise



Change a Grievance Activity 2, Page 7



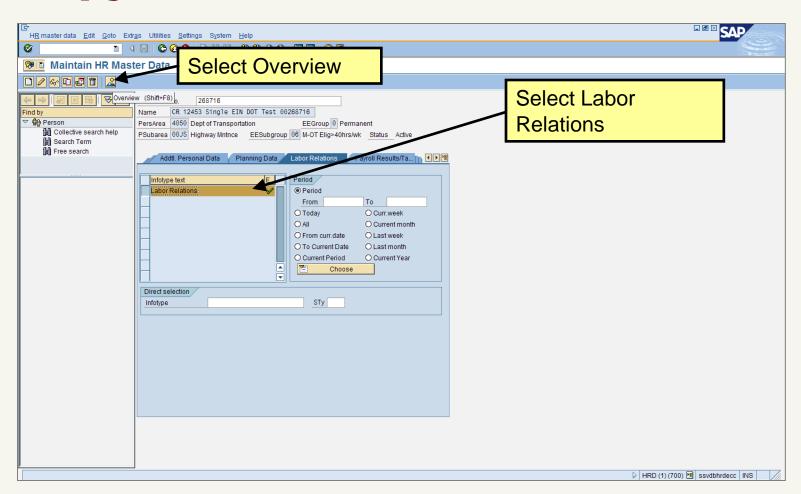
Why Copy a Grievance?

- Copy a grievance record to create additional records and preserve the history of the Grievance.
- The only way all actions related to a grievance can be tracked and easily displayed is by using the copy function.

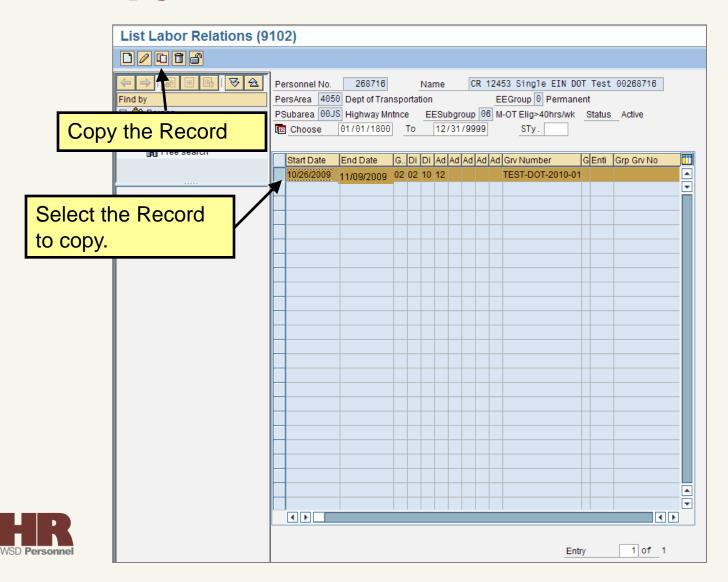


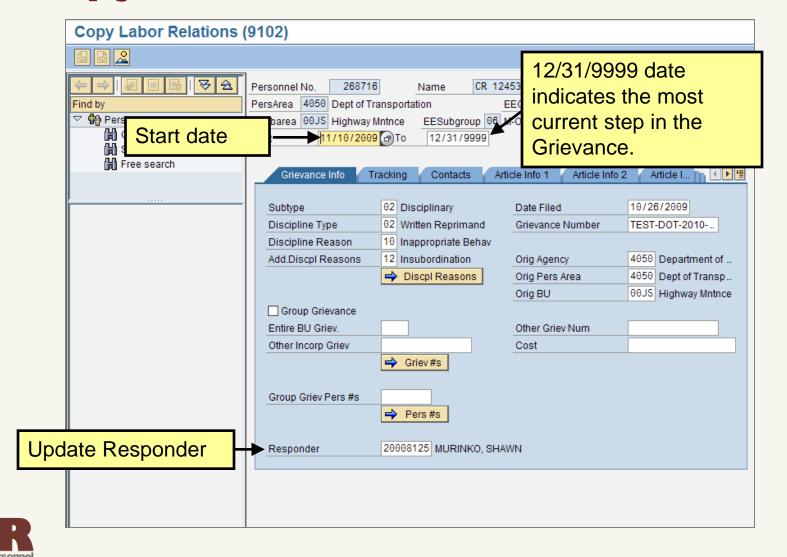
Steps to Copy a Grievance

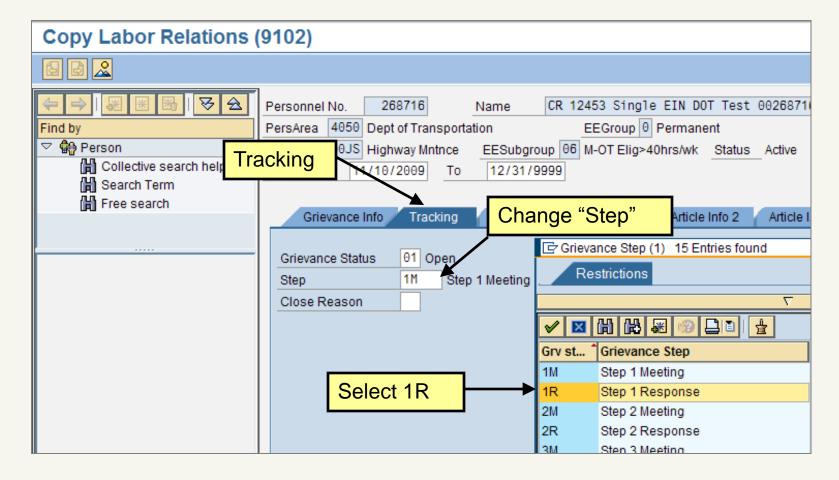
- Enter PA30 in the command field
- In Maintain HR Master Data, enter employee personnel number or search for it
- "Enter" key will populate the employee's personnel record
- Select the "Labor Relations" tab
- Select "Overview" to view all records and identify the one you wish to copy
- With the record you wish to copy highlighted, select the copy function <a>□



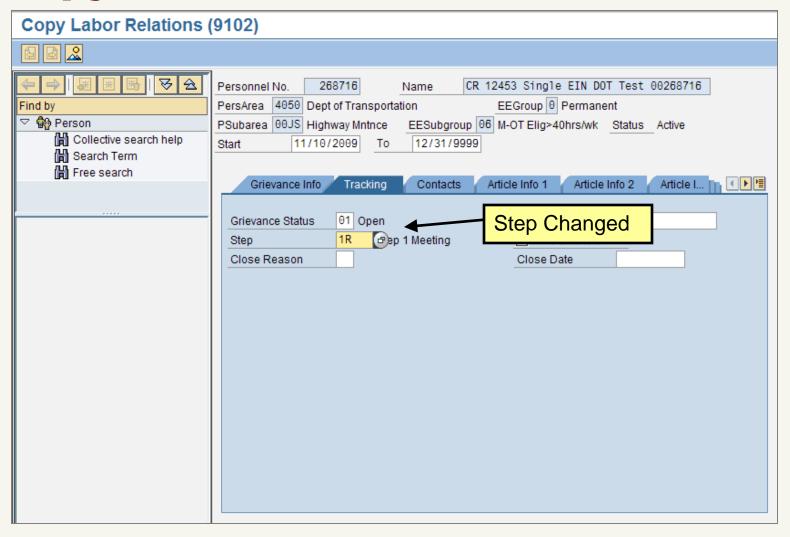




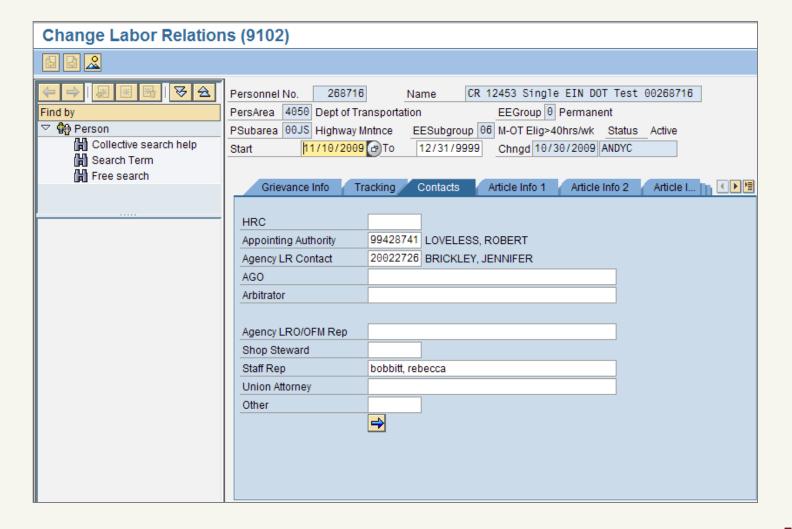






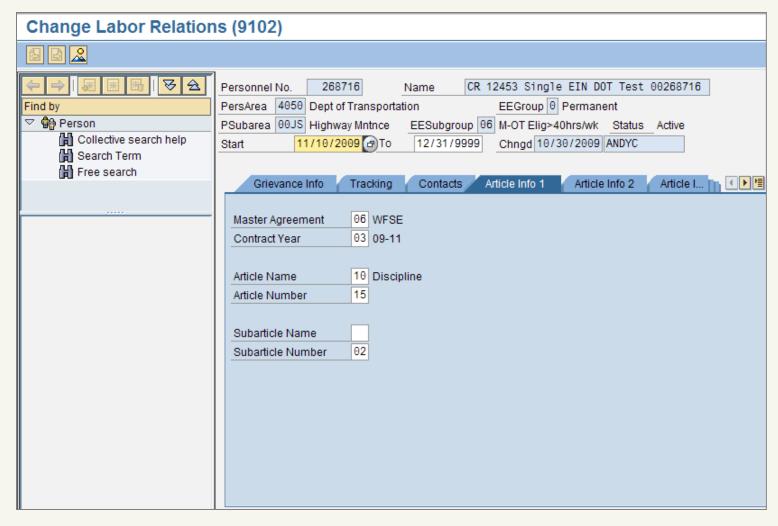




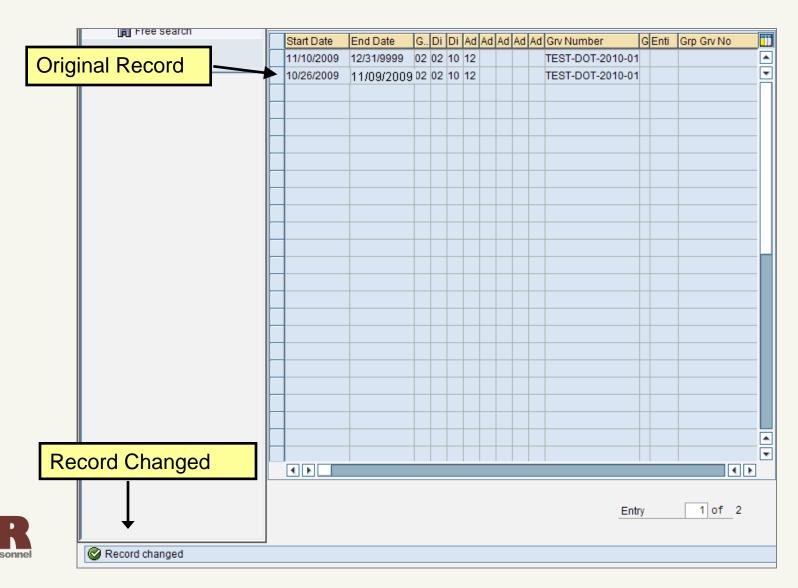




Steps to Copy a Grievance







Grievance Training Exercise



Copy a Grievance Activity 3, Page 8



Close a Grievance

- Close a grievance when you receive documentation from Human Resources, Attorney General's Office or Union Representative indicating it is:
 - Settled
 - Withdrawn
 - Incorporated into another grievance
 - Arbitration decision received*

When an arbitration decision is received the OFM Labor Relations Division (LRD) will enter the closure data. Furthermore, LRD will enter case closure data if closure occurs at any point after elevation to the LRD.



Steps to Close a Grievance

- Always use the copy function to create a **NEW** record when closing a grievance
- Checklist for closing record:
 - Change Start date to close date
 - Verify End (To) date is 12/31/9999
 - Change Grievance Status to Closed
 - Enter Close Reason
 - Enter Close Date
- Change the original record's End (To) date to the same Start date of the closing record



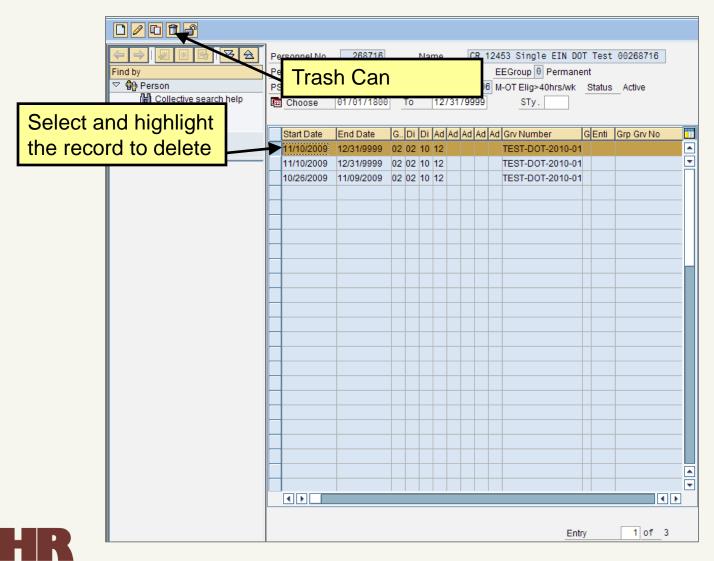
Delete a Grievance Record

Why delete a grievance record?

- Delete a grievance record if it has been created in error and you need to delete it from the grievance history.
- This is a permanent action.



Delete a record



Grievance Training Exercise



Close a Grievance (part 1) and Delete a Grievance (part 2)
Activity 4, Page 10



Record a Time Extension

- Use this process to record when the parties mutually agree to a time extension of the grievance.
- Always use the copy function to create a **NEW** record to capture a time extension.
- Checklist for recording a time extension:
 - Change Start date to date parties mutually agree to time extension
 - Keep grievance step the same as copied record
 - Change End Date (To) date grievance advanced or when time extension ends
 - Check Time Extension box



Grievance Training Exercise



Record a time extension Activity 5, Page 12



Record a Bypassed Step

- Capture when a step is bypassed in the grievance process in order to maintain the history
- Checklist for bypass:
 - □ Change the meeting (#M) record's End (To) date to the date prior to the date notice of bypass is provided to Union or the date the parties mutually agree to bypass
 - Copy the record you were just working in and only update:
 - Grievance status to Bypass
 - Start date to date notice of bypass is provided to Union or the date the parties mutually agree to bypass
 - Add any necessary notes to Maintain Text



Grievance Training Exercise

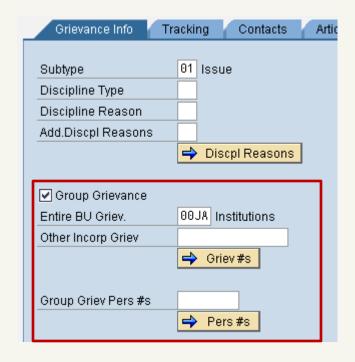


Record a bypassed step in the grievance process
Activity 6, Page 15



Group Grievance Types

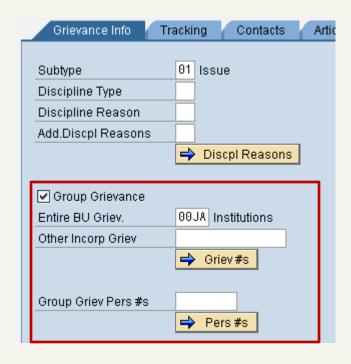
- Entire bargaining unit files a grievance or a grievance is filed on behalf of a bargaining unit
- Two or more employees file a grievance together
- One employee files multiple grievances which are later consolidated
- Two or more employees file similar grievances which are later consolidated





Group Grievance "Must"

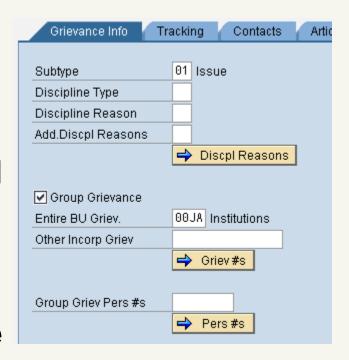
- Identify the employee who will store the group grievance data when the group grievance is one of the following:
 - Entire bargaining unit files a grievance or a grievance is filed on behalf of a bargaining unit
 - Two or more employees file a grievance together
 - Two or more employees file similar grievances which are later consolidated





Create Group Grievances

- A grievance involves an entire bargaining unit (BU)
 - Enter grievance data as usual and save
 - Go back into the record and on the Grievance Info tab, check Group Grievance box
 - Enter the BU code in Entire
 BU Griev. field





Grievance Training Exercise

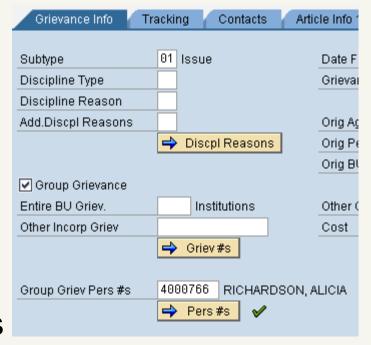


Create a Group Grievance filed by a Bargaining Unit
Activity 7, Page 19



Create Group Grievances

- A group of employees file a grievance
 - Enter grievance data as usual and save
 - Go back into the record and on the Grievance Info tab, check Group Grievance box
 - Enter personnel numbers of grievants, up to five, store any others in
 Maintain Text





Grievance Training Exercise

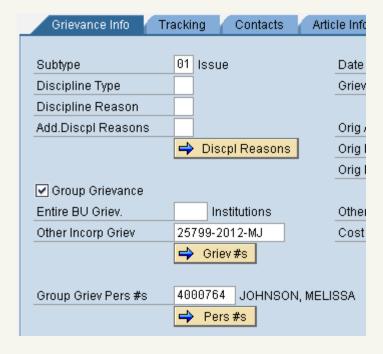


Create a Group Grievance filed by two or more employees
Activity 8, Page 23



Create Group Grievances

- Employee files multiple grievances and parties decide to combine
 - Must select and close grievance records you incorporate
 - In combined grievance,
 enter the grievance
 number in the Other
 Incorp Grievance field
 (up to five) of those closed





Grievance Training Exercise



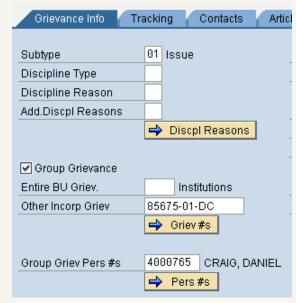
Combine grievances filed by one employee into a single group grievance

Activity 9, Page 27



Create Group Grievances

 Multiple employees, same issue, parties agree to combine



- Must select one employee to store the grievance data of the group grievance
- Close out all grievances except primary
- Record in primary the grievance numbers and employee personnel numbers from the closed out records



Grievance Training Exercise



Combine similar grievances filed by two or more employees into a single group grievance Activity 10, Page 31



Grievance Tracking Reports





Grievance Tracking Reports

- Easily view reports on demand via Portal or BEx
- Manipulate data in HRMS or export to Excel
 - Customize the type of data you want to view/generate.
 - Quickly customize data in the portal to print or export to Excel

Please keep your data entries current by the end of each month.





[Enter Agency Name]

Reinforce Performance

Outcomes:

Employees know how their performance contributes to the goals of the organization. Strong performance is rewarded; poor performance is eliminated. Successful performance is differentiated and strengthened. Employees are held accountable.

Performance Measures

Percent employees with current performance evaluations

Disciplinary actions and reasons, disciplinary grievances/appeals filed and disposition (outcomes)

Reward and recognition practices (TBD)

Formal Disciplinary Actions

Agency Priority: [High/Medium/Low]

Disciplinary Action Taken

Action Type	# of Actions
Dismissals	[XXX]
Demotions	[XXX]
Suspensions	[XXX]
Reduction in Pay*	[XXX]
Total Disciplinary Actions*	[xxx]

^{*} Reduction in Pay is not currently available as an action in HRMS/BI.

Issues Leading to Disciplinary Action

- [XXX]

Analysis:

- [XXX]

Action Steps: (What, by whom, by when)

[XXX]

Data Time Period: [mm/yy] through [mm/yy] Source: [Enter Data Source]





Reinforce Performance

Outcomes:

Employees know how their performance contributes to the goals of the organization. Strong performance is rewarded; poor performance is eliminated. Successful performance is differentiated and strengthened. Employees are held accountable.

Performance Measures

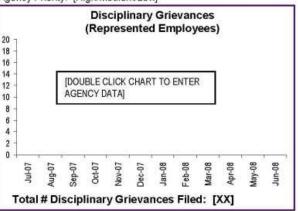
Percent employees with current performance evaluations

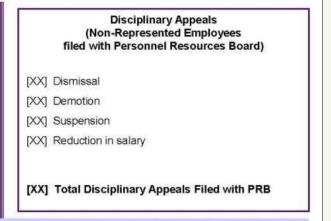
Disciplinary actions and reasons, disciplinary grievances/appeals filed and disposition (outcomes)

Reward and recognition practices (TBD)

Disciplinary Grievances and Appeals

Agency Priority: [High/Medium/Low]



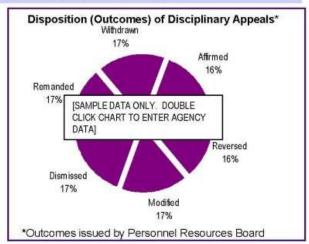


[Enter Agency Name]

There is no one-to-one correlation between the filings shown above and the outcomes displayed in the charts below. The time lag between filing date and when a decision is rendered can cross the time periods indicated.

Disposition (Outcomes) of Disciplinary Grievances

- [XXX]



Data Time Period: [mm/yy] through [mm/yy] Source: [Enter Data Source]

16



Grievance Tracking Reports

Types of Reports available via Portal or BEx:

- Grievance Details Report
- Grievance Master Agreement Report
- Grievance Totals by Agency Report
- Grievance Articles Trend Report
- Grievance Detail Agency Report
- Grievance History Report



Grievance Training Walk Through Activity



Running the Grievance Details
Report via the Portal



Grievance Reports



Complete grievance reporting instruction is available on the OLQR at:

http://hr.wa.gov/payroll/HR MS/OnLineQuickReference/ Pages/GrievanceInformatio n.aspx



Course Objectives

- Upon completion of this course, you will be able to:
 - Explain the roles used in the Grievance Tracking System
 - Perform the required steps to administer a Grievance within the Grievance Tracking System
 - Track, report, and analyze grievance data
 - Take away all grievance resource materials



Resources

- Enterprise Technology Solutions Center, (360) 407-9100
- HRMS End User site:
 http://hr.wa.gov/payroll/HRMS/HRMSSupport/Pages/default.aspx
- The On-Line Quick Reference:

http://hr.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/GrievanceInformation.aspx

- Contact your Agency helpdesk to obtain a logon id and password for HRMS HCM or to request a password change
- Grievance Reporting Instructions

http://hr.wa.gov/payroll/HRMS/OnLineQuickReference/Pages/GrievanceInformation.aspx



Question and Answer





Training Evaluation

To receive credit for this course please complete the course evaluation and participant assessment prior to leaving.



Thank you for your participation!

